

Houston Area Coop on the Gifted and Talented

Process for completing consultant paperwork

Responsibilities of the Host District

Step 1: Contact consultant directly and settle on tentative date and topic.

Step 2: Sign up for a date on the google doc or confirm availability of the date and topic with the COOP President. (Check the wiki for contact info)

Step 3: Confirm date with consultant directly.

Step 4: Complete Workshop Agreement form, except for Consultant Signature and Social Security or Federal ID. **Duplicate the form and sign both copies** (you may want to make a copy to keep in your files). Include all of the consultant's contact information and the agreed upon honorarium.

DO NOT SEND THE WORKSHOP AGREEMENT FORM TO THE CONSULTANT.

Step 5:

Mail both signed originals to Alene Lindley, Gifted and Talented/Advanced Academics Department, Katy ISD, 6301 South Stadium Lane, Katy, TX 77494.

Responsibilities of Katy ISD as Financial Unit

Step 6:

Alene will sign and mail the agreement, the expense reporting form, KISD Contract and W-9 form directly to the consultant.

Step 7:

Consultant will return one signed copy of the agreement (with Social Security or Federal ID) and Contract for Independent Contractor and W-9 form to Alene Lindley as indicated on the agreement.

Additional Responsibilities of the Host District

Prior to the workshop: Stay in communication with consultant about travel arrangements.

Who will pick the consultant up from the airport and provide transportation during the consultant's stay?

Will you accompany the consultant to dinner?

What about breakfast and getting to the presentation location?

What will you pick up for lunch so the consultant doesn't have to leave the presentation site?

Who will take the consultant back to the airport or to dinner that evening and to the airport the next day?

On the day of the workshop: Remind the consultant to submit the *Expense Reporting Form* with original receipts to Alene Lindley to be paid. This may be instead of the consultant's usual invoice or in addition to, but the *Expense Reporting Form* must be submitted.

Following the workshop: Make a note for yourself regarding the experience of hosting this consultant, i.e. would you recommend him/her again?

What are the things to look out for next time?

